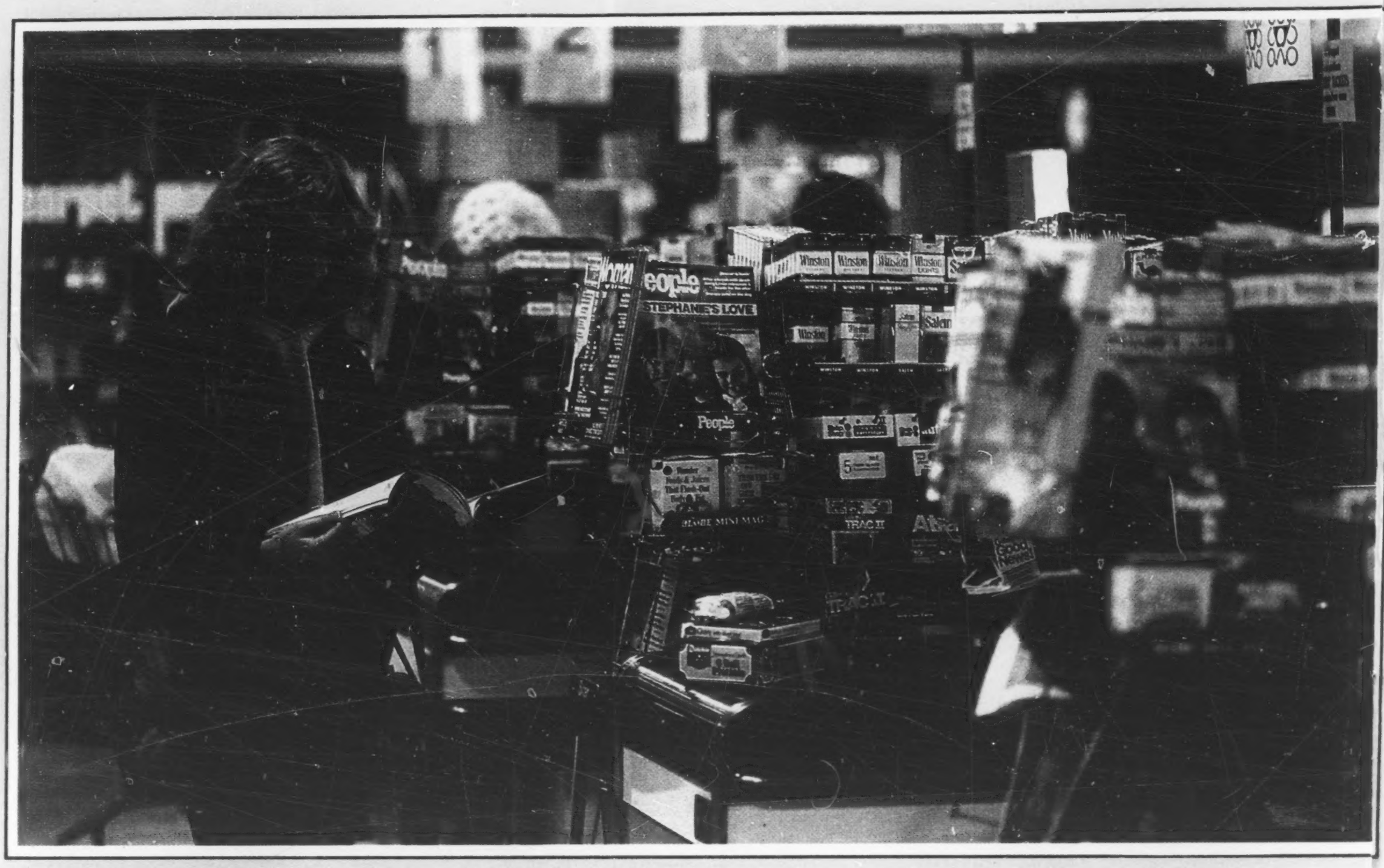

CLOSING THE COMMUNICATION GAP

Retailers, distributors and publishers talk more openly in an effort to solve long-standing conflicts

Ask a supermarket or drug store merchandiser to rank his 10 favorite departments, and chances are books and periodicals won't be included.

Indeed, the love-hate relationship that has characterized this department for decades continues to dominate industry debate.

Retailers, on the one hand, know that fast-turning, high-margin magazines, tabloids, paperbacks and books represent one of the most lucrative profit pockets in their stores. But offsetting this enthusiasm is the nagging realization that display allowances, title selections, return policies and maintenance duties make this department a source of frustration—not only for retailers, but also for the distributors and publishers who serve them.

There are signs, however, that the forces that once kept retailers, distributors and publishers at each others' throats are breaking down, thanks in part to a concerted effort to enhance communication and a better understanding of each party's needs.

"The lines of communication are better than ever before," reports Ronald Scott, a Connecticut consultant serving publishers, national distributors and wholesalers. "The debate, once behind closed doors, is now out on the table, and everyone seems to be gaining."

Profit-hungry mass-market retailers, led by supermarkets and drug stores, now realize that magazines, tabloids, paperbacks and books can help offset the low-margin performance of other food and nonfood product categories. Family reading centers have moved out of the test phase and are being installed almost daily in new and remodeled supermarkets and drug stores. Well-signed and well-maintained, these centers have proven to be key ingredients in the formula for attracting today's convenience-minded consumer.

New technology has provided distributors and retailers with the ability to monitor unit sales on both a regional and individual store basis, making the process of title selection an ever more accurate science.

Retail display allowances, though still a headache for some retailers, are being collected with

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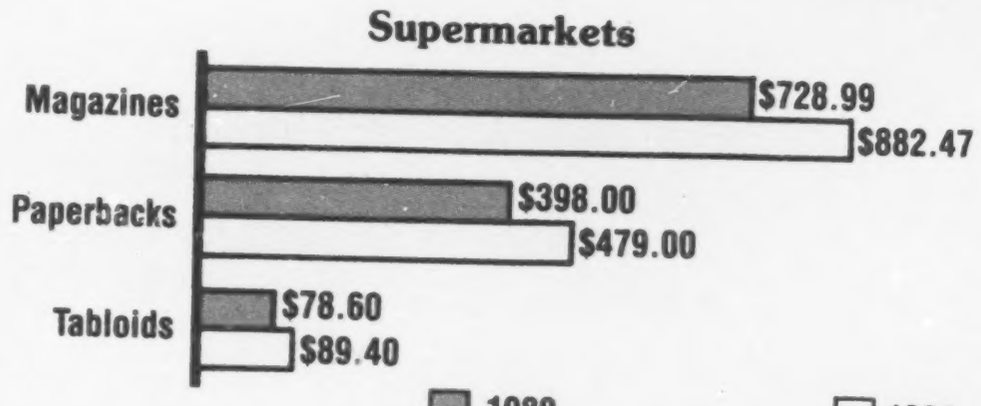
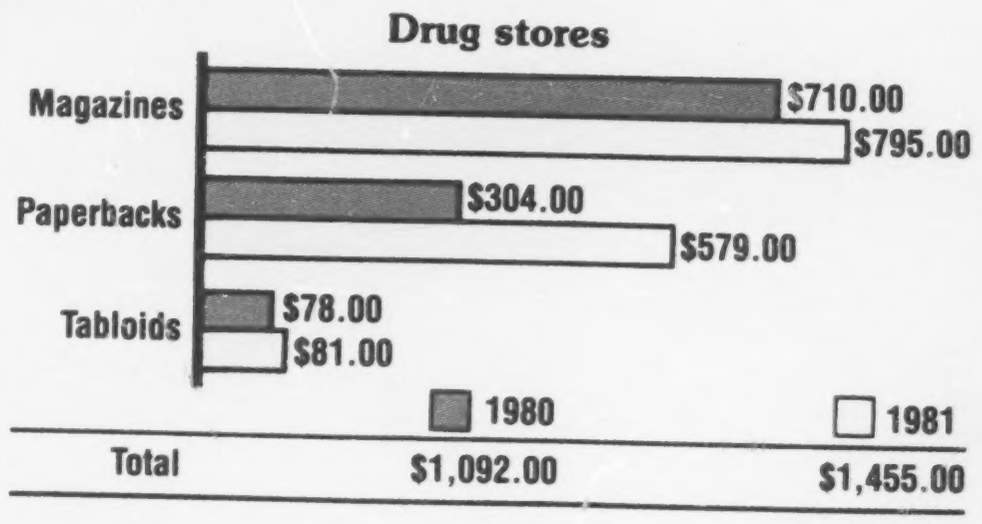
Magazines & books: supermarkets and drug stores

(dollar volume in millions)





Source: *CSA Supermarkets*, Periodicals Institute Inc.

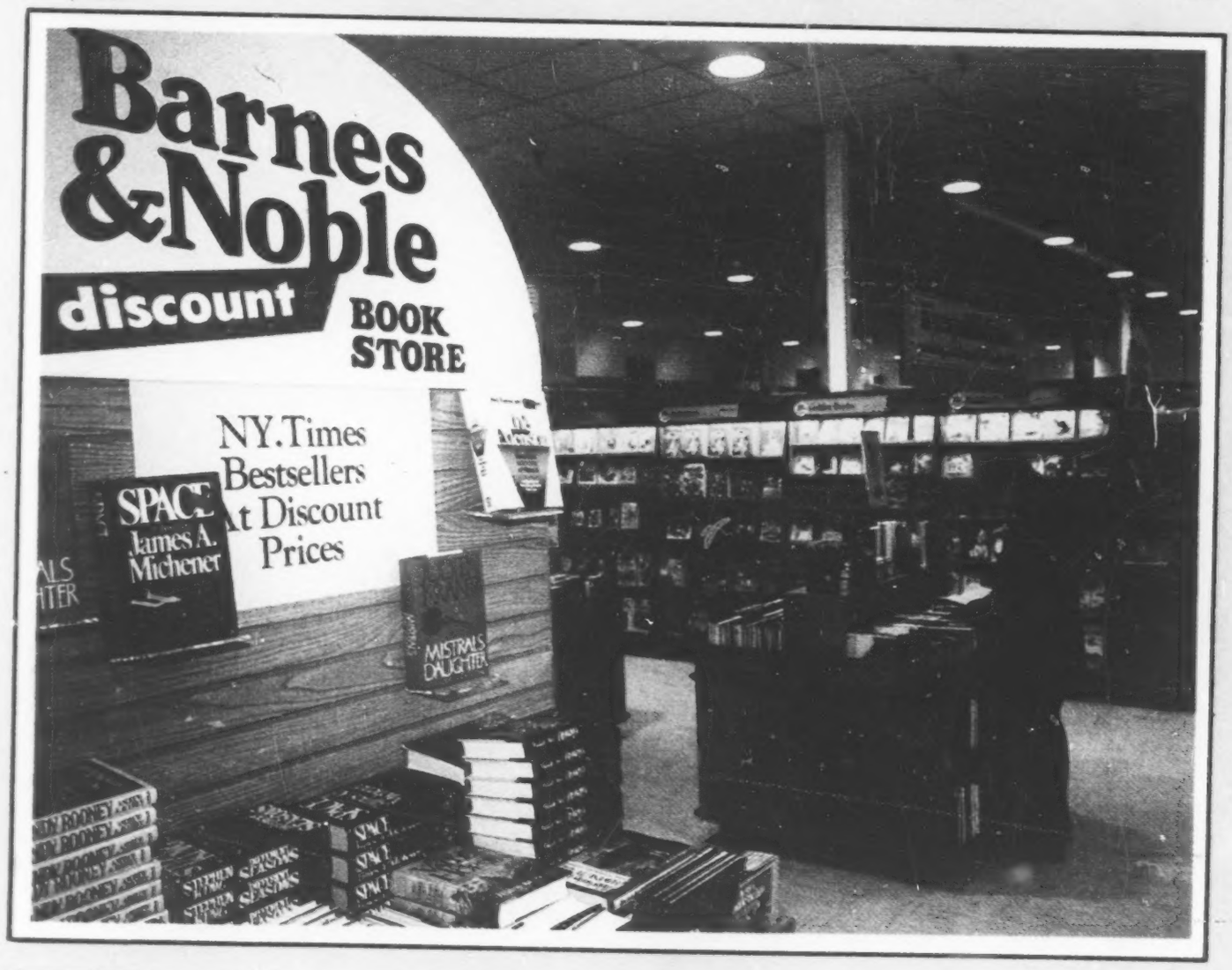
greater speed and accuracy than was ever before possible. And though still in the discussion stage, the possibility of replacing the RDA program with an acceptable up-front discount policy appears to be attracting more serious attention.

With supermarkets and drug stores now accounting for over two-thirds of the volume in this burgeoning $3.9 billion-a-year category, publishers realize that the mass market is "where it's at." Hence, their promotional, incentive and display programs have assumed a more aggressive, results-oriented posture. Both *Woman's Day* and the *National Enquirer*, for instance, launched massive consumer advertising campaigns during the past year to reinforce their ranks of already loyal readers.

Wholesalers, whose reputations have at times been tarnished by slipshod operators, have enhanced their in-store service, RDA collection and return programs to make the retailers' job easier and more profitable. And retailers, hoping to maximize this category's unprecedented profit potential, are making a special effort to maintain "balanced" front-end displays as well as orderly sales-generating in-line sections.

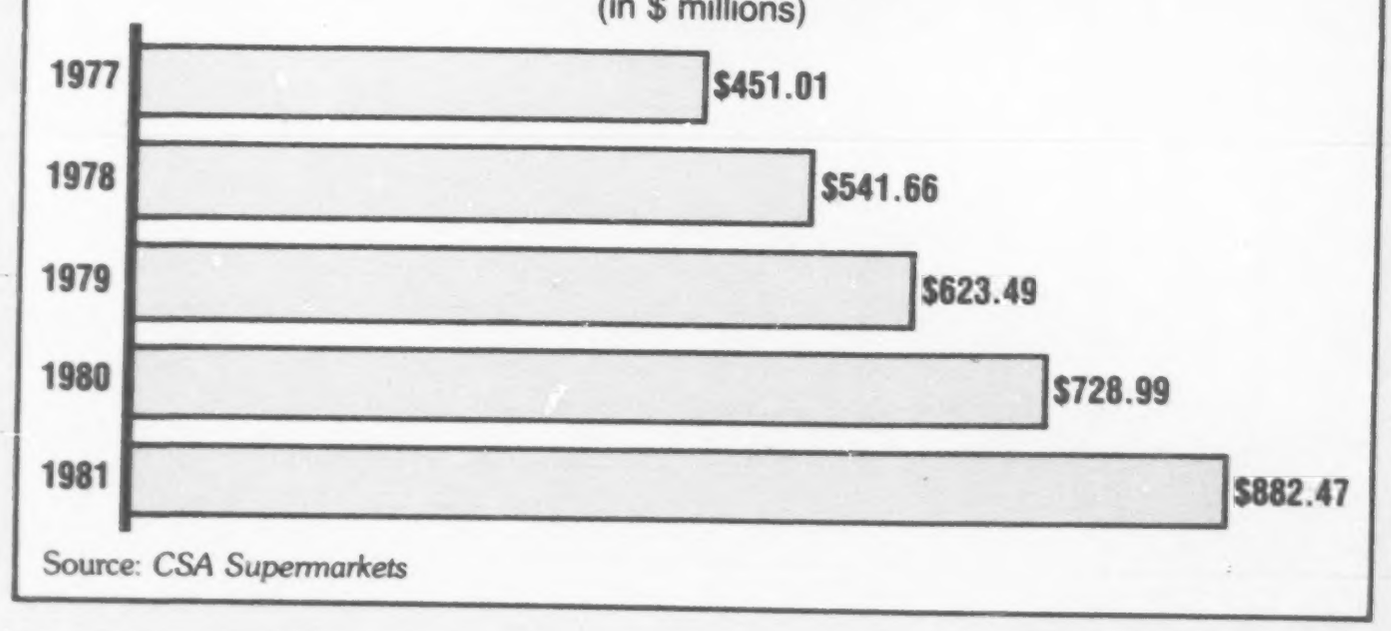
As the No. 2 general merchandise category—second only to housewares—publications represent big business and big bucks for America's supermarkets and drug stores. And although the recession softened unit sales in the past year, the Council for Periodical Distributors reports an 11% sales gain in dollar sales (in all outlets) during the first half of 1982.

The proliferation of new titles, including specialty magazines and local/regional titles, reflects the demands of today's fast-paced consumer eager to find information and relaxation in a quick and convenient way. Magazines, tabloids, paperbacks and hardcover books fill this need, and at a price most still consider a bargain. □



Magazine sales

(in $ millions)



Source: *CSA Supermarkets*

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PAPERBACK SWEETHEARTS

Romance novels still lead the paperback biz; retailers respond with expanded displays both in-line and up-front

As they have in the past, romance novels continue to rank as the sweetheart of the paperback book industry.

Indeed, while most publication categories produced only modest results last year, romance publishers continued to attract new readers and sales with an assortment of new products. Industry experts project that during 1983, romances alone will account for up to 40% of the $1.4 billion paperback business. This is good news for supermarket and drug store retailers, whose prime locations and female-dominated customer base make them the major mass-market outlets for these high-margin, fast-turning books.

With the proliferation of family reading centers, supermarkets and drug stores are devoting more and more selling space to paperbacks, whose built-in discount price structure often makes them more attractive than RDA-backed magazines. This expansion has not only generated new sales, retailers say, but has also stimulated multiple purchases.

While the classic love-story theme of most romance books remains intact, major publishers have introduced several series to attract new readers.

Harlequin and Silhouette, virtually household words in the romance publishing biz, will each supplement their existing lines with a new series this year.

Earlier this month, Silhouette introduced its "Intimate Moments" line, which spokesman Lynda Schwartz describes as a "longer-read" version (256 pages) of Silhouette's Desire series. The four monthly titles will be priced at $1.75 each during a special introductory offer, but will then move up to $2.25 retail.

"Our research tells us there is considerable interest among many of our readers for a longer version, a more complex story featuring more developed characters in almost a high-brow fantasy-like environment," says Schwartz. Slightly more sensual than its predecessors, the Intimate Moments series will cater to a more upscale reader, described by Schwartz as a "young, single professional woman earning up to $20,000 a year."

Harlequin beefed up its five-star romance series with a new line of "American" romances this spring. Set in "all-American" locations and featuring "all-American" characters, the books are targeted at readers "who may not pick up one of the sweet romances, but want something a little more sensual, yet still tactful, to read," says Harlequin's Richard Sadlon, president of sales.

"We still have a very dedicated group of readers who want what we've been giving them for years," Sadlon adds. "But at the same time, we realize that today's woman, who more often than not works outside the home, wants something that's more closely in tune with her life."

The male reader, for years ignored by book publishers, has also latched on to Harlequin's expanding line of male action adventure paperbacks. Frequently listed on the best-seller charts at major book-store chains, these books represent a small but growing market for supermarket and drug store retailers.

Backed by extensive consumer advertising in general interest magazines and on television, romance novels and their male action counterparts represent one of the most reliable categories in the entire book and magazine section. □

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Special 50th anniversary NACDS issue

'Partners in Progress' section—see inside

DRUG STORE NEWS

Vol. 5 No. 10/Incorporating CHAIN STORE AGE Drug Magazine Published by Lebhar-Friedman Inc./ May 2, 1983

Gala events to mark NACDS' 50th anniversary

WASHINGTON—A fast-paced five days including performances by Neil Sedaka and Rudolf Nureyev and an All-American picnic on a Virginia plantation await the drug executives attending the 50th anniversary celebration of the National Association of Chain Drug Stores.

Social events and black-tie dinners will be interspersed with lectures from notables ranging from former Secretary of State Henry Kissinger to former football defensive end Merlin Olsen.

Two thousand guests are expected to attend the historic anniversary celebration. The occasion will provide drug executives with entertainment and information as well as a chance to reflect on the success of the NACDS and to consider the goals of the group.

Sessions are scheduled to begin early in the morning and go late into the night. Executives attempting to see a bit of the nation's capital that is not part of the NACDS itinerary will be hard pressed to find the time.

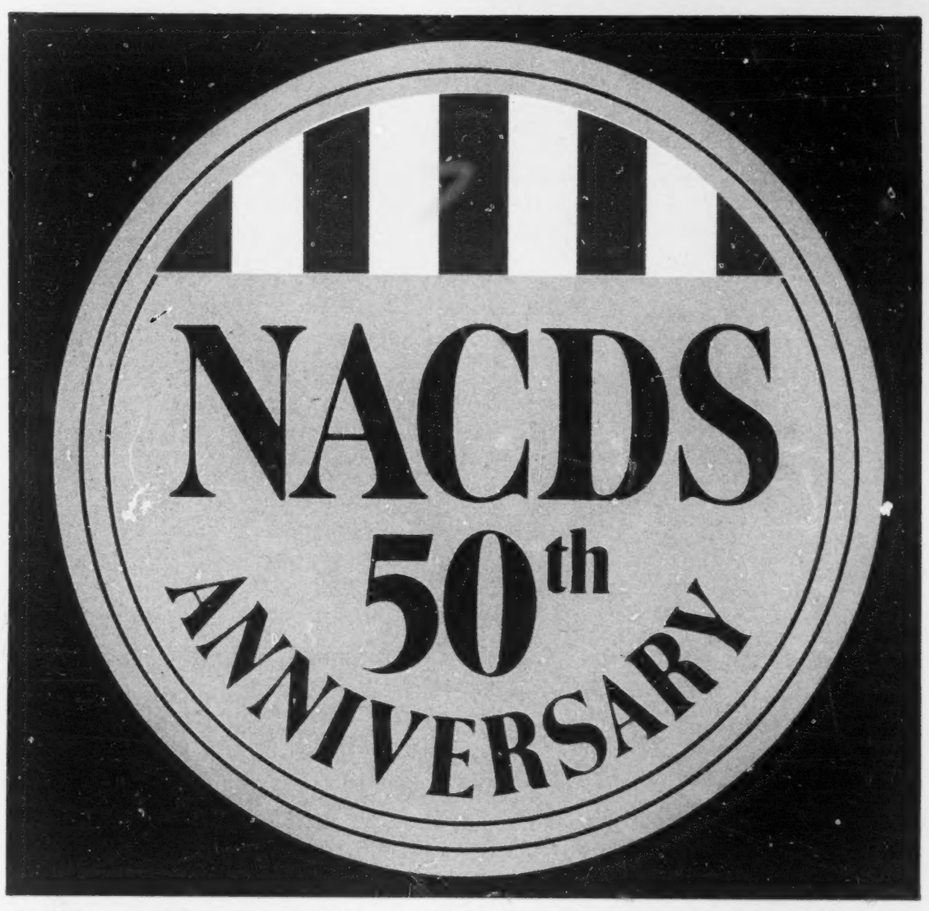
On the first Sunday night of the extravaganza, Nureyev will star in Don Quixote at the Kennedy Center. A black-tie dinner at the Washington Hilton is also scheduled for that night.

The next night, following a full business schedule that includes lectures by *New York Times* columnist William Safire and U.S. Sen. Paul Laxalt of Nevada, the chain drug executives will be treated to a buffet dinner at the National Gallery of Art.

Not only will the diners be surrounded by the Raphael exhibit, but they will be in a build-

Continued on page 50

Some 2,000 chain drug executives are expected to descend on Washington for 50th Anniversary Celebration of the National Association of Chain Drug Stores.



Striking emblem symbolizes NACDS' 50 years' service to health care.

Kissinger, others to speak

WASHINGTON—Henry Kissinger will lead a variety of top-flight speakers representing government, business, sports, journalism and entertainment at the 50th Anniversary of the National Association of Chain Drug Stores.

Kissinger, the former secretary of state in the Nixon and Ford Administration, is scheduled to address the NACDS on the morning of May 11, the last day of the five-day anniversary celebration.

The first speaker of the celebration will be television announcer Howard K. Smith, who will be the emcee. Smith will introduce on May 8 an audiovisual presentation of the history of the NACDS as well as presentations by television personalities Barbara Walters and Ted Koppel.

On May 9, Smith will be back to introduce New York Times columnist William Safire, U.S. Senator Paul Laxalt (R-Nev.) and Robert Strauss, former chairman of the Democratic National Committee.

On May 11, the speakers besides Kissinger will be Owen B. Butler, chairman of Procter & Gamble, and Merlin Olsen, former professional football player and now a sports commentator.

Sheldon W. Fantle

Sidney Dworkin

Robert J. Bolger

Association's leaders reflect on gains, goals

WASHINGTON—"The 50th anniversary is the type of event that makes you look back and see where you've been. It's a nostalgic period that you like to reflect upon, but you still have to look to the future," said Sidney Dworkin, chairman, president and ceo of Revco and the outgoing chairman of the National Association of Chain Drug Stores.

The NACDS leadership, ranging from Dworkin to incoming chairman Henry A. Panasci Jr., the chairman and ceo of Fay's Drug, and Sheldon W. Fantle, president and ceo of Peoples Drug and the chairman of the 50th anniversary meeting, agree the organization has solidified the voice of pharmacy, but must continue to prepare for the future.

Robert J. Bolger, president of the NACDS, summed it up, "We are celebrating the 50th birthday of NACDS, but it is even more important to recognize the more than 50 years of great service that the chain drug industry has provided for the American public.

"In this relatively short history, chain drug stores have become a major dependable source for the health care services and other needs. They have been among the leaders of innovative retailing and merchandising practices. The next century should see even more progress in developing new and improved services for American consumers," he said.

Henry A. Panasci Jr.

Dworkin noted the drug chains have proven to be recession-resistant in their 50-year metamorphosis. "There are prescriptions and convalescent

Continued on page 50

1933: NACDS forms, offers hope for future

In sharp contrast with this gala 50th anniversary celebration, NACDS' first meeting was a sombre event triggered by the ravages of the nation's Great Depression.

Meeting at New York City's Vanderbilt Hotel, representatives of five drug stores chains agreed that, if they were to survive the post-Depression recovery, drug chains had to secure an organized voice on the Retail Drug Code Authority, an offshoot of the Federal Government's National Recovery Act (NRA).

Fred J. Griffiths, president of the Pennsylvania Drug Co., organized the meeting, which was also attended by C. S. Davis of the Dow Drug Co., Cincinnati; Louis Rodnon of Silver Rod Stores, Brooklyn, N.Y.; Wallace J. Smith of Read Drug Stores, Baltimore; Harry Kaufman of Whelan Drug Co., New York; Max and Joseph Rosenwald of Affiliated Drug Stores; *Chain Store Age* editor Godfrey M. Lebhar, cofounder with Arnold Friedman of *Drug Store News*' parent company, and New York attorney C. H. Scott.

These drug store retailers, like their contemporary counterparts, had high hopes for the future of America's chain drug stores. But just three months after the inaugural meeting, association president George M. Gales, president of the Louis K. Liggett Co., New York, asked his colleagues whether "this organization, as it now stands, has any definite place? Should it be continued, now that it has served its original purpose, or should it be disbanded?"

In a loud, enthusiastic and

Continued on page 50

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— News in brief —

Brody, Pathmark ceo, dies

WOODBRIDGE, N.J.—Herbert Brody, vice chairman and ceo of Supermarkets General Corp., owners and operators of Pathmark Stores and pharmacies, died April 11, 1983. He was 68 years old.

Brody was one of the nation's leading supermarket retailers. He was a founder of the Wakefern Food Corp. in the 1940's and served as president of the Shop Rite Stores. In 1956, along with Alex Aidekman and Milton Perlmutter, he formed Supermarkets Operating Co., the predecessor of Supermarkets General. In 1968, he helped create Pathmark Stores, the nation's 10th largest food chain. Pathmark presently operates 115 units with pharmacies.

Eckerd opens jet center

CLEARWATER, Fla.—Jack Eckerd Corp. recently held the grand opening of its Jet Executive Center at the St. Petersburg-Clearwater International Airport.

The facility is a full-service fixed based operation with a 19,000-sq.-ft. hangar and a 6,400-sq.-ft. office building. Eckerd houses two of its own airplanes in the hangar and rents space to other companies in the Clearwater area. Services offered include aircraft maintenance and repair, fuel, car and limousine rentals, aircraft catering, a conference room and a pilots' lounge. The site is about 10 miles from Eckerd headquarters.

Two gain promotions at SDM

TORONTO—Shoppers Drug Mart President David R. Bloom has announced the appointment of Herbert Binder as executive vp of the chain's Central West Region and Albert (Ubby) Krakauer as executive vp of its Central East Region.

Central West includes 88 Shoppers Drug Mart stores in Western Ontario and Manitoba, and Central East comprises 104 stores in Eastern Ontario.

Both Binder and Krakauer joined SDM as associate store owners, and through their participation in various associate, regional and central office committees, have gained extensive knowledge of the company. Krakauer has also served as head of Koffler Academy, the company's in-house training institute.

SDM operates 439 drug stores in Canada and the United States, which during the most recent fiscal year, achieved $1 billion in sales for the first time.

Skaggs closes after peso devaluation

SAN YSIDRO, Calif.—Citing the devaluation of the Mexican peso as the cause of dwindling sales, the Skaggs Drug Center here closed its doors. A nearby Alpha Beta also closed. Both stores were just inside the American border.

Skaggs sold its pharmacy files to the Longs drug store in San Ysidro.

The peso dropped from 27 to the dollar in February 1982, to 150 to the dollar in late March 1983.

Low-margin chains expand in Detroit

DETROIT—There's some low-margin action in this market, with two deep discounters announcing plans to expand. F&M Distributors, the Warren, Mich.-based chain of discount units, has signed leases for two more units in the Detroit area. This will bring the chain's total to 11. While most of the stores operate in Michigan, F&M has branched out to Indiana, Ohio and Illinois.

In addition, Sonny and Cecille Raichlen, the husband and wife team that opened Cecille's in 1981, have plans for a second store. The couple presently operate a 7,000-sq.-ft. store in posh Birmingham, Mich., and it is expected that the second unit will be positioned in an equally affluent area. Rather than concentrate on the cut case and plain decor associated with discounting, Cecille's sports a spotless and clinical look.

Winner of Nostalgia Quiz #23 chosen

Don Collier of Hook Drugs in Richmond, Ind., is the winner of $100 in *Drug Store News'* Nostalgia Quiz #23. The correct answer was Katz & Besthoff, which put dollar bills on the front seats at managers' meetings to encourage people to move to the front.

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Vol. 5, No. 10 May 2, 1983

Bill's Drugs acquires 6-unit Medico chain in No. Calif.

LAFAYETTE, Calif.—Bill's Drugs has acquired the six-store Medico Drug chain, headquartered in Santa Rosa, Calif., for cash and stock.

Mike Franchetti, former president of Medico and son of the chain's father, will be a board member of Bill's.

Medico stores (5,000 sq. ft.) are located north of San Francisco near the three stores recently acquired from Pay 'n Save. Pay 'n Save owns an undisclosed percentage of the Bill's chain.

The Medico acquisition brings Bill's to 26 stores. All units are in northern California, 150 miles north and 150 miles south of Bill's headquarters.

Bill Eames, president of the chain, opened his first store in 1959 in Lafayette with 2,700 sq. ft. of space. It was relocated once, remodeled and enlarged to include his office, and wound up with 15,000 sq. ft. It is his No. 1 profit store.

The real growth of Bill's Drugs occurred in 1974 when Eames bought three stores from SupeRx. Subsequently, he bought six from Pay 'n Save, before acquiring the three additional units from Pay 'n Save last month.

Basically, Bill's operates stores in three sizes: 10,000 and 15,000 and 20,000 sq. ft. However, some of his recent acquisitions (including Medico) have been smaller. These include Calaway's (9,000 sq. ft.) in Madera, and a 1,000-sq.-ft. Serv-U and a 5,000-sq.-ft. Serv-U in Merced.

Hook, Rite Aid to open downtown stores in revitalized Indianapolis

INDIANAPOLIS—Hook Drugs has returned to the Mile Square section of downtown after a 12-year absence, and Rite Aid is about to open its first store in the area under the Rite Aid banner.

Rite Aid also owns a Drug Palace in Indianapolis, but it is a low-margin, deep-discount store that operates outside the Rite Aid distribution network. The unit does not have a Rite Aid logo.

Rite Aid's entry into Mile Square and the return of Hook are part of the revitalization of the city's business district.

While Hook is based in Indianapolis and has always operated stores in the downtown section, including a unit near the State Office Building, the chain pulled out of the Mile Square area 12 years ago during the flight of business to the suburbs.

"There used to be a Hook's on every corner," according to chain spokesman Tom Dingledy. He said the chain left the Mile Square because there was not enough business to support the drug stores.

At one time, there were 17 Hook stores in Mile Square.

But the Mile Square area is being renovated, and the Hoosier Dome, which is sceduled for completion in 1985, is expected to bring conventions to the city. The new 6,000-sq.-ft. Hook store, which is slated to open this spring, will be in the North Illinois Park multilevel parking garage and adjacent to the downtown Hilton Hotel. it will be across the street from the new 35-story American United Life Insurance Building.

The new Rite Aid, which is under construction, will be similar to the chain's 6,500-sq.-ft. prototype.

Pay 'n Save to expand testing of Seattle nutrition centers

SEATTLE—Within the next two months, Pay 'n Save will test McKesson's Health Spectrum nutrition center in six more stores in the Seattle area. The chain has been testing in two stores since mid-November 1982.

Pay 'n Save began advertising in January and has been running one-half-page and full-page freestanding ads twice a month. The test stores feature six to 10 ad items, with prices 25% off regular retail, except for books, which are reduced 10% to 15%.

"Books," says Jim Agopsowicz, Pay 'n Save's OTC drug merchandiser, "have been sleepers." The price range is $2.95 to $16.95.

Other good selling ad items are combination packs of Thompson and Schiff vitamins (2-packs at reduced prices); bee pollen, lysine, E and C vitamins, stress vitamins and protein powder.

Not only are ad items changed, but so is the advertising vehicle—three different newspapers are being tried.

"In testing further," says Agopsowicz, "we will probably retain the same size section at one store [15 to 20 ft.] while increasing the facings of fast sellers and reducing facings for slow sellers. In the other store we will eliminate the slow sellers, taking 4 ft. off the vitamin section, and thus shrink Health Spectrum to about 12 ft."

Currently, a typical section has 300 sku's. In addition to vitamins, books, protein powder and herbs, the section also contains skin care products.

Inventory investment at cost is $3,000 to $5,000, with 50% of the space devoted to natural vitamins. Health Spectrum is across the aisle from natural private label and controlled vitamins, thus forming a vitamin valley.

Staple merchandise is sold at 35% to 40% margins, as compared to 40%-60% in health food stores.

Pay 'n Save is shooting for six turns a year. At present, the merchandise is turning half that.

Agopsowicz says he selected McKesson as the supplier because "it is more convenient to buy from one source. In ordering direct, the problem in many lines is the large minimum orders required. Direct not only builds inventories, but reduces return on investment."

But health food flunks out after one year in Sav-On test

HAWTHORNE, Calif.—After more than a year of testing, Sav-On will close its nutrition center (called the Natural Body Center) after it sells down the existing stock. Sales have been far below the chain's expectations.

The center was 25 ft. long by 13 ft. wide and was located in the right front corner of the store.

All the items in the center were packaged. One side wall was stocked with natural hair care items, books, vitamins, herbs and tea. The opposite wall had foods, grains, seeds, cereal, nuts, crackers and chips.

Against the back wall was a five-door refrigerator/freezer unit.

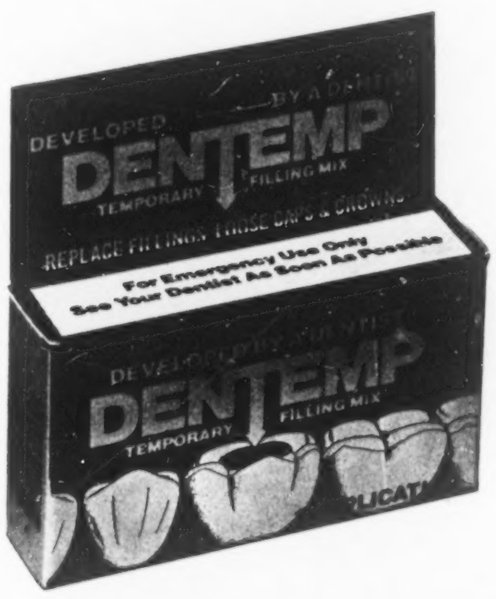
In the fall of 1982, Sav-On made changes in the product mix to try to buoy lagging sales. The changes: all frozen food

Continued on page 130

Private label soda

K&B introduced private label soda in January and the product has been doing well, according to Sydney Besthoff III, chain president. "It's very promotable. We just got in with four or five flavors," he said. The chain has long carried private-label beer and whiskey plus prominent displays of brand-name sodas, often featured on endcap displays.

If you have ever lost a filling or had a loose cap or crown, and couldn't get to your dentist immediately, even you might have suffered!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PHARMACY

Two-thirds of all doctor visits result in prescriptions—survey

WASHINGTON—Physicians prescribe drugs in nearly two-thirds of all office visits, today, but the use of medication therapy varies greatly for different diagnoses from a low of 29% for general examination to a high of 94% for certain respiratory conditions, a newly released Government survey found.

Overall, a surprising 13% of all drugs prescribed during M.D. office visits are for over-the-counter medications, according to the most recent (1980) data collected by the National Center for Health Statistics.

The survey was based on 46,000 patient-related forms from 1,869 office-based physicians on 18 "common" ailments ranging from disc disorders, to diabetes, to hypertension.

Among other things the survey found "visits for some diagnoses were more drug-intensive than others." Drug intensity referred to the number of drugs prescribed during one office visit.

According to the survey, ischemic heart disease had the highest drug intensity rate at 2.54 prescriptions per visit. "On the average 20% of the visits included three drugs and 29% included four or more," Government researchers said.

Three cardiac drugs—Inderal, Lanoxin and Digoxin—accounted for 21% of the 26,523,000 drugs prescribed in office visits involving heart disorders. Another 20% consisted of the vasodilating agents—Isordil, Nitroglycerin, Nitro-bid, Nitrostat and Sorbitrate.

On the other hand the lowest illness-related drug intensity rate was for neurotic disorders (0.88%). Only during 52% of the 13.7 million office visits surveyed did physicians prescribe one or more drugs in treating neurotic problems.

Who's getting all those prescriptions?

	# of Rxs (in thousands)	# of Rxs (per patient visit)	# of Rxs (per person annually)
Patient sex			
Male	358,822 (40%)	1.09	3.26
Female	528,896 (60%)	1.09	4.49
Patient age			
0-2	51,628 (5%)	0.83	4.92
3-9	47,001 (5%)	0.89	2.09
10-19	65,249 (7%)	0.82	1.70
20-39	204,836 (22%)	0.89	2.78
40-59	208,225 (22%)	1.14	4.52
60-64	74,544 (8%)	1.32	7.02
65+	290,910 (31%)	1.46	11.08
Geographic region			
East	209,811 (22%)	1.03	4.25
Midwest	264,269 (28%)	1.12	4.49
South	311,532 (32%)	1.16	4.05
West	174,360 (18%)	1.02	3.95
Total	959,972 (100%)	1.09	4.19

Source: F.D.A.'s *Drug Utilization in the U.S.—1981.*

Valium was prescribed the most often followed by Tranxene, Ativan and Librium. Together these products accounted for 20% of the 11,951,000 drugs prescribed for patients with neurotic disorders.

Just as visits for some diagnoses were more "drug-intensive" than others, the likelihood a physician would prescribe brand name drugs rather than generic products also differed with the ailment.

A higher than average use of brand names occurred when the diagnoses were for neurotic disorders (85%), disc disorders (85%), and back strains and sprains (83%), the survey found.

On the other hand, generic drugs were prescribed with greater frequency for diabetes (33%), obesity (35%), throat disorders (34%), infant and child care (75%), and medical examinations (45%).

"The relatively high proportion of generic entities mentioned with the last two diagnoses were probably due to the large number of immunizations given during the total visits," the survey maintained.

While Rx drugs—brand name or generic—accounted for the majority of medication prescribed overall OTC drugs were selected more frequently in certain cases including diabetes (25%) because of the utilization of insulin, and throat disorders (15%) "probably due to the availability of many OTC drugs used for symptomatic relief of these conditions," Government researchers said.

Over-the-counter drugs also accounted for a significant proportion of the drugs prescribed for pregnant women. Vitamins comprised 67% of these drugs and the most frequently named multivitamins were Prenatal Formula, Materna, Stuartnatal, Pramet PA and Watalins.

The survey also attempted to determine the type of medication most likely to be used.

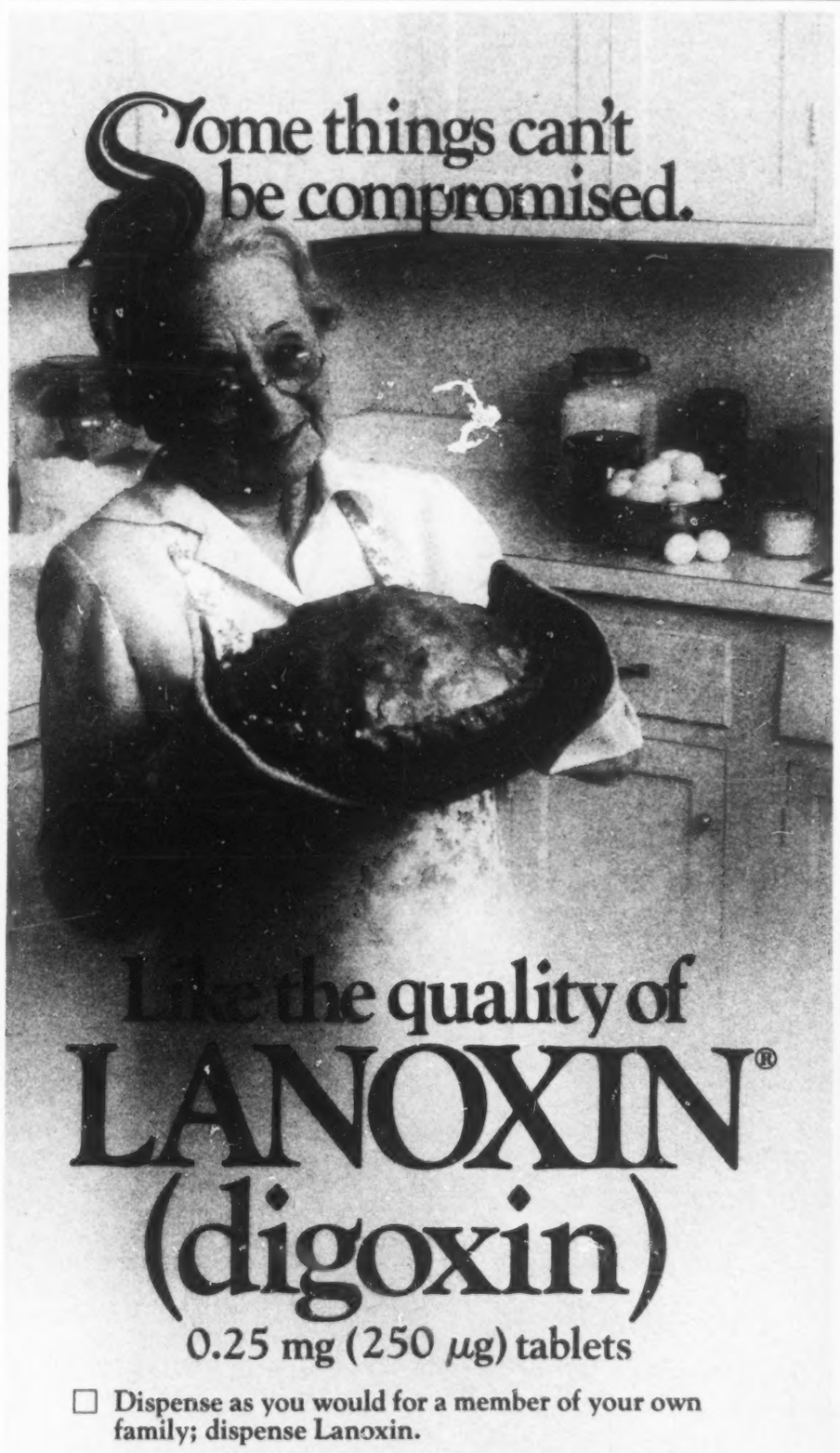
Researchers found antihistamines, anti-infective agents and cough preparations accounted for 80% of the 32 million drugs prescribed during 177 million office visits involving upper respiratory infections (URI).

The antibiotics Penicillin, Tetracycline, and E.E.S. were ordered with almost equal frequency and comprised 11% of the drugs prescribed by physicians for URI, the study said.

In contrast to the frequent use of drugs in treating respiratory infections, researchers found that medication therapy was "used only in about 61% of visits for disc and other back problems."

The largest category of drugs used was analgesics and antipyretics which accounted for 41% of 7,138,000 drugs prescribed during office visits for back disorders.

Aspirin, acetaminophen (with and without codeine) and phenacetin were the most commonly used generic substances.



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